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## **Attachment A**

### **Requirements Document**

#### **PMO Toolkit**

**ED-FSA-09-R-0045**

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## **1. Purpose**

The United States Department of Education, Office of Federal Student Aid (FSA), Project Management Office (PMO) envisions the standardization of project management across Federal Student Aid . The need for standardization was a major reason for the establishment of the FSA PMO. To assist in this standardization, FSA PMO is seeking Project Management Software Tools that will standardize PMO processes within FSA. FSA PMO envisions a software tool that will assist project managers in achieving project success by:

- Presenting senior management with consistent information needed to make effective decisions that support the enterprise
- Promoting the integration of program/project management (P/PM) functions into the organization by simplifying project management processes and templates.
- Developing competent and productive project managers and teams by providing professional development opportunities and well as standard, recognizable and easily understandable project management tools.

## **2. FSA PMO High-Level Requirements**

The desired Project Management Software Toolkit shall include the following functionality and capabilities:

- Must be a COTS product
- Must provide customizable PMBOK compliant project management templates, processes/process map to assist project managers
- Must provide scalable processes to meet large and small project needs
- Must provide a user-friendly format linking templates, processes and process map, and help text (detailed descriptions)
- Must provide audio or online project management and PMP prep training
- Must provide an enterprise license for unlimited users
- Must provide installation support and ongoing customer service
- Cost effective

## **3. BOT International “Process On Demand” PMO Toolkit**

In conducting market research, FSA identified a brand-name, COTS, HTML based software product called “Process on Demand.” Process on Demand is published by BOT International,



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and sold commercially through Gantthead.com, who owns the vending and marketing rights to Process on Demand. The features and functionality of Process On Demand include:

- Processes and templates for project management (PMBOK and SDLC)
  - Process narrations
  - Visual workflows
  - Step guidance
  - Easy to use and well formatted templates, forms, and checklists
- Policies and dashboards
  - Executive dashboards for top project status and information
    - Status view
    - Gantt (schedule) view
    - Cost view
    - Risk view
    - Dashboard Policy
  - Organizational policies
    - Project type and size guidelines
    - Team site and document management guidelines
    - PMO dashboarding guidelines
  - Learning resources
    - PMO training presentations
    - PMP certification prep – 35 hours of multi-media training presentations
  - Supporting information and resources
    - Sarbanes-Oxley compliance guidelines
    - Other information, help, and support
- Features for integration to customer infrastructure and applications
  - A company IT or PMO intranet
  - Project management applications such as Microsoft Project Server, or equivalents
  - Collaboration and document management such as Microsoft SharePoint, or equivalents
    - PMO Teamsite
    - Project Teamsites
    - Document Folders
- Features for administration
  - Cascading Style Sheet (CSS)
  - Page layout templates
  - Library items
  - Template update macros
  - Process Builder module for documenting and rendering new processes